

Village Blueprint

Building a Community for All Ages

Authored by Leslie Marks, in collaboration with the
Bethesda-Chevy Chase Regional Services Center

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Contents

Welcome	4
Acknowledgements from Leslie Marks, Blueprint Author	5
Executive Summary	6
Getting Started	9
Early Work	14
Developing a Working Model	18
Building A Village Budget	29
Getting the Message Out	33
Managing Your Village	39
The Care and Feeding of Volunteers	45
About the Author	53
About the Bethesda-Chevy Chase Regional Services Center	54

Welcome



Dear Community Leader:

Thank you for your interest in building a Village in your neighborhood. You are at the forefront of local and national efforts to provide local services that address the changing demographics of our community. Since the first day of my administration, I have made it clear that my vision and priorities include vital living for all our residents and particularly seniors.

It is clear to me that Villages provide critical neighbor-to-neighbor connections to combat social isolation, improve mobility and access to services, and provide knowledge and support necessary to empower residents to be healthy and secure.

Participants of my 2009 Senior Summit identified the need to encourage and support the creation of Villages in Montgomery County neighborhoods. The Village movement in Montgomery County has already begun. Neighbors in Bannockburn, Chevy Chase, Burning Tree, Cabin John, and Somerset have come together to create Villages and communities that serve their residents. These Villages in turn are inspiring many other communities to begin work on their own efforts.



Since 2007, my administration has been actively engaged with these communities – exploring partnerships, providing advice and technical assistance, providing training, and creating opportunities for the sharing of ideas. The Office of Community Partnerships, Department of Health and Human Services, and Regional Services Centers are to be commended for their work with emerging Villages. We are also looking at these communities and others nationwide as models for community-based senior services that can be applied in all parts of the County.

Your efforts help build a County that ensures the vital living of all of our residents. This Village Blueprint provides guidance, examples, and links to resources that will help make your vision for your community and others yet to be created a reality. I congratulate Leslie Marks and the staff at the Bethesda-Chevy Chase Regional Services Center for creating a resource which I know you and others in our County will find helpful.

Sincerely,

A handwritten signature in cursive script that reads "Isiah Leggett".

Isiah Leggett
County Executive

Acknowledgements from Leslie Marks, Blueprint Author

It has been quite a journey from the time I agreed to take on the task of writing a “how to start a Village” document to the final completion almost a year later. I met a lot of wonderful and helpful people along the way and I learned so much about Villages and the opportunities and challenges of making them work. Coming from the building industry, I am very familiar with building new Villages and I was intrigued about how to successfully build a Village program in an existing neighborhood.

No project of this size or magnitude gets done without a lot of help from many different sources. I would like to thank the many friends, colleagues and associates who helped me out along the way.

First of all, I would like to thank the founders of Beacon Hill Village for their vision and entrepreneurial spirit. Their hard work and imagination helped start a nationwide movement not lost on the communities of Montgomery County.

Harry Rosenberg and Leslie Kessler were tremendous sources of information and support. They formed the first Village in Montgomery County and we have all benefited from their hard work and attention to detail. Leslie and Harry provided me tremendous amount of information, documentation and support throughout this project.

I received a great deal of useful material about volunteer management from Senior Connections and I want to thank Sue Dollins, Executive Director for sharing this information.

I’d like to thank Andy Mollison from Palisades Village. Andy was ready to listen to my questions and offer the benefit of his experience with the creation of Palisades Village. Andy willingly offered examples of documents created by Palisades Village.

When I needed information about volunteer management, specifically, a job description for volunteers, Barbara Hammock provided the information I needed. I used information Barbara provided in a training session on volunteer management she conducted for Montgomery County Villages.

The most complicated part of Village formation, for those Villages that want to create a nonprofit entity is the Federal and State process required to do so. I prevailed upon Julian H. Spirer, Esq., Spirer Law Firm, P.C., to provide me with guidelines about how to get started with the process of creating a 501(c)3 nonprofit entity.

The section on Red Flags; Observations and Opportunities was provided by The Mental Health Association of Maryland.

Thank you to everyone who helped this project become a reality. I also want thank Ken Hartman, the Director of the B-CC Government Center who encouraged me to take the job and supported my efforts along the way.

For those of you who are reading this Blueprint, I hope you find it useful and that your journey developing your community Village is a rewarding and successful.

Executive Summary

Villages are a national movement that started in Beacon Hill, Massachusetts. A Village is a grass roots organization created for the purpose of providing older adults lifestyle choices that include their desire to continue to live in their own homes with independence and dignity. Montgomery County created the “Village Blueprint” to support communities within the county that desire to start a Village organization in their neighborhood. The Blueprint is a step-by-step guide for organizers about the process of initiating and developing a Village in their community.

The Village Blueprint is divided into seven (7) “how to” sections and five (5) sections of sample forms and additional resources available locally or on the web to assist Village organizers achieve their goals. While each Village will have it’s own distinct personality and priorities, there is an organizing formula that all groups should follow to successfully launch a new Village.

The first chapter of the Blueprint discusses getting started. In this chapter you will get information about initial steps that an organizing group needs to consider in order begin the process of organizing a new Village. The Blueprint provides contact sources within Montgomery County Government that can assist your group in the conceptual process.

Chapter two discusses the homework that the organizing group needs to do and questions that need to be answered in order to move forward with your Village. One of the most important steps to be taken is a needs assessment to determine the interests and needs within your community. Again, resource information is provided to assist with such things and developing and analyzing the needs assessment.

The next step in the development of your Village is creating a working model. In this chapter the pros and cons of creating an all-volunteer community or going with a paid staff model are outlined. Establishing community priorities are discussed with

examples of services your group may want to offer in your Village. Structural questions are discussed such as, budgets, initial funding sources, creating a 501(c)3, and liability insurance. The organizational structure of your Village and the steps that need to be taken by your group is part of this chapter.

There is one chapter reserved for the Village budget, how to build one and the scope of services it may cover. In this chapter membership fees are addressed.

Marketing the Village to the neighbors in your Village community is an important element to the success of the Village start up. In this chapter there is discussion of how to reach out to neighbors and how to sell the Village vision that your initial organizing group developed. There are ideas about how to create a marketing plan and different marketing ideas and opportunities. You will find an outline of how to prepare for your first community meeting. The community meeting to announce the formation of a community Village requires planning and forethought to be successful. There are also county resources that can be drawn on to help you with the marketing of your Village to residents.

There is a chapter on the management of the community Village. Again, you will find a discussion of the pros and cons of paid staff versus an all volunteer management model. The chapter addresses the necessity for standardized forms, job descriptions for volunteers, and assessment and record keeping forms. A brief discussion of strategic planning, a process that is helpful to getting all leadership on the same track and creating priorities and a roadmap of action for a period of 2 – 5 years is available. After a strategic plan is adopted, it is important for the group to monitor the plan and measure progress against the plan.

The volunteer section of the Blueprint is an in-depth look at recruiting volunteers, keeping volunteers engaged, training volunteers, and evaluating volunteer service. The chapter provides a listing of suggested volunteer activities that your Village may use in creating its own program. There are resources identified for training volunteers. Each volunteer should sign a confidentiality statement to protect recipients of volunteer

services. The issue of insuring volunteer activities from liability is also discussed. Volunteer management software is listed in this section.

We hope you find this Blueprint a useful tool in your process of creating and launching the lifestyle option of Village living in your community.

1 Getting Started

AARP has characterized the huge expansion of the Village movement as not so much an aging issue but a living issue. Far from being a cookie cutter program, Villages customize, personalize and humanize a living environment and lifestyle. The Village movement captures peoples' interest in staying in their own home and has the benefit of creating a greater, deeper, and stronger sense of community.

Early Leadership

Every new organization needs a vision and a dedicated core of individuals ready and willing to make that vision a reality. Identifying a core group of individuals in your community that share the vision of creating a Village within the community is a top priority.

Keep in mind as your group gets started that you are setting the tone and direction for your Village. Consider starting small and building on your successes. Establish an ability of the leadership and Village volunteers to deliver on their promises. You can always add programming as you find a need and demand.

Identifying a core group of individuals in your community that share the vision of is a top priority.

The embryo of a new village often starts with a group of neighbors at an informal gathering discussing the issues facing them as they confront the realization of aging and the challenges of staying in their own home. This group often re-enforces individual desires to continue to live in the same home in the same neighborhood and a need to figure out how to accomplish that goal.

This is not a one person job. Whether your effort begins as neighbors talking informally or one individual who has articulated the vision, a working group needs to be established. Early organizational meetings deal with a wide range of issues, group organization, group leadership and defining and assigning leadership roles. Your early

leadership team should be willing to commit the time and energy to the creation of your village for approximately 3 – 5 years.

Here are some qualities that you should look for as you create your leadership team.

Intelligent risk takers: You are starting something new in your community and you need a team of leaders who enjoy working on new ventures and exhibit an entrepreneurial willingness to experiment.

Respect and contacts: The leadership will need to approach organizations, community groups and members of the community to ask for help, money, and support. Knowing a wide range of people within the community is helpful, being a respected member of the community is essential.

Nonprofit and/or professional expertise: It is very helpful to have members of your leadership team who represent some of the following areas of expertise:

- Financial/accounting
- Legal
- Fundraising
- Management experience in other non profit organizations
- Experience managing volunteers
- Experience with aging and the elderly

Strategic Partners: Consider creating an advisory committee of strategic partners that are interested in supporting your village. Your strategic partners do not necessarily need to be members of your village; just interested parties of helping your village become successful.

Residence: The leadership should come from the community itself. There may be exceptions to this rule if the community enters into a partnership with an organization

such as a local hospital, that organization may have representation on the leadership team.

Financial Means: Early leadership members sometimes may need to provide initial financial support either by their own contributions or by soliciting contributions from others. This is not a critical characteristic but a helpful one. Even all-volunteer Villages need financial support to sustain operations.

Community Representation: Ideally, the leadership should represent age, gender, class, and ethnicity of the community. Often, the leadership will be self-selected individuals who want to start a village. Leadership diversity should be a goal and achieved to the level possible.

Early in the organizational period an interim leader should be selected from your leadership team. One of the first discussions the leadership team should have is defining the roles of the team as a whole and the tasks that need to be addressed in order to push the creation of an operating Village forward. Each team member must accept the responsibility of at least one of the identifiable tasks. A group leader needs to be identified early - this person takes on the responsibility of coordinating the group efforts and moving the group forward toward achieving its goals.

Resources

Montgomery County Government offers a variety of resources helpful to community groups exploring creating Villages in their neighborhoods. As you begin the process of creating a new Village, take time to explore the resources available to you. The following are a list of County resources that should be explored:

- **The Bethesda Chevy Chase Regional Services Center (BCCRSC):** Neighborhood Support Networks - Villages Resource Exchange. Any of the County's Regional Services Centers are excellent places to gather information and explore partnerships. BCCRSC offers professional consultation at no fee in helping your core group start a new Village. The staff at BCCRSC can put you in touch with other Villages groups in the County. They offer networking sessions for existing Villages and those

involved in starting new Villages. BCCRSC provides embryo Villages connections to a wide range of county and non-profit services.

www.montgomerycountymd.gov/bcc

Phone: 240-777-8200

- **Senior Connection:** Assistance in training, umbrella liability insurance, and transportation.

email: seniorconnectionmc@gmail.com

phone: 301-962-0820

- **Montgomery County Commission on Aging:** Provides assistance in fielding a community survey. The survey (which we will talk about in more detail in Chapter 2) is essential in determining a scope of services your “village” will support.

contact: Odile Saddi, Executive Director,

Odile.Saddi@montgomerycountymd.gov

- **Montgomery County Aging & Disabilities Services:** Support in analyzing community survey responses.

contact: Charles Smith, Aging & Disability Services

Charles.Smith@montgomerycountymd.gov

phone: 240-777-3000

- **Montgomery County Volunteer Center:** Can help identify pro bono consulting in a variety of areas, such as, financial, legal, volunteer training, and computer training.

www.montgomerycountymd.gov/volunteer

email: volunteer@montgomerycountymd.gov

phone: 240-777-2600

- **Montgomery County Information and Resources**

www.montgomerycountymd.gov/senior

phone: 240-777-3000

- **Office of Community Partnerships**

contact: Austin Heyman, 240-777-2570

Austin.Heyman@montgomerycountymd.gov

- **Legal Aid**

Legal Aid Bureau, Inc.-Citizens Program

www.mdlab.org

phone: 410-539-5340

Pro Bono Legal Advice Clinic

www.montbar.org

phone: 301-565-7675

- **Maryland Association of Nonprofits**

www.marylandassociationofnonprofits.com

Silver Spring Office: 8720 Georgia Ave., Ste. 303

Phone: 877-565-0707

- **Village to Village Network:** a national organization that supports the Village movement. This is a membership organization with a wide variety of support available to members.

www.vtvnetwork.org

See Appendix C for additional resources.

2 Early Work

Doing Your Homework

Once a core group of leaders is in place, the next big step is doing your homework. There are many Villages within Montgomery County as well as throughout the county that can provide invaluable information. Some Villages have written detailed documents outlining their start up process as well as lessons learned from their experiences. There is a great deal of information about Villages on the web that should be explored. Meeting with other Village organizers is often very enlightening and should be put on your “to do” list. The BCCRSC can provide you with a list of Montgomery County Villages.

Identifying Geographical Boundaries

Knowing your community is an essential part of your early work. You can retrieve census data about your community from the Maryland National Capital Park & Planning Commission (MNCPPC). MNCPPC has analyses of aging trends within the county as well

Keep your goals flexible enough to change as the needs of your membership changes.

as within your community. MNCPPC data includes the age, sex and income of the residents in your community; number of households; and household size. Understanding the profile of your neighborhood will help your leadership decide if there is a sufficient core group of the appropriate age to warrant moving ahead. The data will also provide an insight into the general economic circumstances of residents.

Your community probably has a subdivision name and boundary delineation on record at MNCPPC. The recorded subdivision can be used as the geographic definition for the community service area. One of the leadership’s decisions is to identify the physical geographic boundaries for the

Village. Regional Services Centers have MNCPPC maps on hand that identify neighborhood boundaries.

Finding a Home

It is helpful, though not essential, to find a place that your Village can call home. A community clubhouse with meeting space is ideal. For communities with no internal community meeting space, you may find a local church or synagogue that will be willing to host your Village meetings. Other meeting options are: local libraries, local businesses or banks with conference rooms or meeting spaces, or perhaps local government buildings such as the Regional Services Centers and of course members' homes.

Developing a Mission Statement

Developing a mission for your village is one of the most important tasks your leadership group must undertake and can be the most difficult task for the group. Defining a mission is a statement of purpose for your Village.

The mission statement offers the vision for establishing a community Village, who you hope to serve, and how. An example of a mission statement is:

“The purpose of Friendly Village is to support the lifestyle needs of the residents of the Village in order to allow residents the choice of continuing to live in their current home and community while sustaining an acceptable quality of life.”

Identifying a Target Audience

Making a decision about the profile of the group your Village intends to serve will influence your programming and goals. There are several options for your leadership and community to consider. Your Village can choose to be intergenerational and include all neighbors living in your targeted neighborhood. Or, as many communities decide, the target audience you wish to serve may be a senior audience. If you decide that your Village mission is to serve a senior audience you must define senior either by age, ability or both. Deciding on your target audience will affect everything else you do.

Goals

Along with creating a mission and targeting your audience, the leadership group must create goals for the Village. Goals should be specific, measurable, realistic, tangible, and most importantly, achievable. Something to keep in mind - keep your goals flexible enough to change as the needs of your membership changes.

Goals should
be specific,
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achievable.

Examples of Village goals are:

- To make the routine of daily life accessible to all residents by having a means of transportation available.
- To assist residents maintain acceptable nutritional levels.
- To provide opportunities for residents to have social contacts and meaningful interaction with neighbors.
- To provide tools for improving personal and neighborhood security.
- To assist residents with chores of daily living on an as needed basis.
- To provide a neighborhood check on the well being of Village residents.
- Provide a list of reliable contractors for home improvement needs.
- Enhance quality of life and vital living experiences.

The Needs Assessment

A needs assessment is important to determine the interest of your community residents in being a part of a Village program. A needs assessment will determine the interests of the community residents in terms of programs they would like to see implemented. The needs assessment will assist the leadership to establish a scope of services to offer residents. Understanding the depth and scope of preferred services will

impact budgeting, neighborhood volunteerism, outside community resource support, strategic partnerships, and scope of government assistance.

The County's Regional Services Centers and Department of Health and Human Services can advise your group in developing the neighborhood assessment document. They can also provide assistance in having the returned assessments analyzed. It will be up to the leadership group to promote and publicize the needs assessment, to alert residents to expect to receive the assessment and to explain to residents the importance of completing the assessment and returning it. It is important to get a strong response to the needs assessment and this may be the first test of leadership's skills and commitment to getting the job done.

See Addendum A for a sample survey.

3 Developing a Working Model

A major decision your leadership group must address is the operational model for your Village. Will you best accomplish your goals by operating your Village on a strictly volunteer model or will your Village program function best using paid staff in some format. If you decide on an all-volunteer model, you will need strong and committed leadership and an organized and committed group of volunteers. There needs to be a clear chain of command for volunteers and ultimately someone has to be in charge.

Paid Staff or Volunteers

If you decide that paid staff is the model for your Village, then the decision needs to be made about the function and responsibilities of the staff. After that decision is made you will be in a position to decide how much staff time will be necessary to accomplish the outlined responsibilities. There are pros and cons to each decision, paid staff versus an all-volunteer organization - both have been tried. Therefore an initial decision about whether to have paid staff is necessary to proceed with the creation of a business plan.

You are not locked
into initial staffing
decisions.
Consider starting
as a volunteer
group and grow
into paid staff.

Paid Staff

Pros ----- Cons

- An accountable person(s) whose sole responsibility is to pursue the program objectives of the "village."
- The opportunity for a greater scope of programming offerings
- Timely evaluations of programmatic successes, needed program adjustments, program elimination
- Timely responses to members needs - Someone is always on the job and accountable
- Everyone knows who is responsible
- A greater ability to research programs and implementation of programs
- Someone to organize and manage volunteers
- The necessity for a larger budget to support paying staff. You should plan on paying between \$45,000 - \$80,000 for paid staff in addition to benefits.
- Likely to charge higher membership fees to support staff
- Need to assess if higher fees are sustainable
- Coordination between paid staff goals and Village members goals
- Managing the staff
- The potential need for paid office space and office equipment such as computers, desks, chairs, lamps, phones, etc.

Qualifications for paid staff should include non profit experience; healthcare or social work experience; and development or fundraising experience.

Volunteer Organizations

Pros ----- Cons

- | | |
|--|--|
| <ul style="list-style-type: none">○ Lower membership dues and costs to residents who want to participate.○ Can create a greater sense of community. Village members directly supporting and helping their neighbors and fellow village members.○ Initially minimize organization's financial liability at startup.○ Gets people in the Village involved○ Substantially less expensive with less impact on operating budget○ Maintains a direct connection to needs of Village residents○ Neighbors may be easier to approach than paid staff | <ul style="list-style-type: none">○ The need for detailed organizational structure and specific job assignments and responsibilities○ Volunteers don't always feel the same commitment and urgency to get the job done as paid staff○ The sustainability of an all-volunteer Village program○ Do volunteers have the credentials and experience to provide needed services?○ The need for someone to be in charge and responsible○ Who will manage and train volunteers○ Potential confidentiality issues○ Insurance and liability issues |
|--|--|

See page 39 for additional discussion on managing your village.

Implementing the Vision

You are ready for the next steps in the creation of your neighborhood once you have successfully achieved the following:

- Assembled your leadership team
- Decided on a community name
- Identified community boundaries
- Created an initial mission statement
- Identified a target audience eligible for membership
- Decided whether your village will operate as an all volunteer model or a paid staff model
- Agreed to your Village goals

- Sent out and received back the community survey

After you have carefully analyzed the results of the community survey you should have a good idea of the scope of services residents are interested in receiving. The results of the community survey will give the Village leadership the criteria for establishing a menu of services they propose the Village provide resident members. Existing Villages have found that the most sought after services are social events, transportation to appointments, and handyman services such as changing light bulbs.

The following is a sample list of services that might be offered as a result of citizen interest. You might consider bundling services into packages and offering packages of services for a set fee. Bundling services is one way to reduce costs if you are charging members for services.

- **Transportation to appointments** such as doctors, beauty parlor, cultural events, or meetings
- **Coordination and dissemination of county services** available to support seniors living in their own homes
- **Help with grocery shopping** either providing rides or doing the shopping for a resident who can't shop for themselves
- **Help for sight impaired residents**, i.e., balancing checkbooks, writing checks
- **Access to reliable contractors** for home repair and routine home maintenance services, such as, changing light bulbs, shoveling snow from walks, unplugging drain backups. Consumer Checkbook is a service that rates contractors. You can outsource referral sources, a free service to members; contractors pay to be included on a list. Referral services also screen vendors.
- **Social programs** such as wine & cheese, potluck dinners, coffees, book reviews. Social programming is very important in creating community

and developing trust between village members. It is easier for a village member to ask for help from a volunteer if he/she knows that volunteer.

- **Educational programs** on topics such as health & wellness, financial planning, current events
- **Security watch**
- **Junk Collection**

Partnerships

As you develop your business or organizational model, consider partnerships with existing local non-profits as you consider how to implement services. Burning Tree Village has a partnership with Senior Connection for transportation services to its residents. Senior Connection takes phone calls for transportation services and coordinates volunteers.

Other non-profits, such as Top Banana Home Delivered Groceries can shop for groceries and help residents put them away for a nominal fee.

Initial Funding

Your business or operational model also needs to address basic issues such as finding seed money and deciding on an initial fee structure. Looking for seed money is most practically done after a draft first year operation budget has been prepared. The budget will provide an indication of the amount of seed money that will be required. Potential sources of funding may include applying for grants from the County or from non profit foundations and finding community partners that are willing to put up seed money including congregations, local hospitals, and businesses; and contributions from your leadership group. Some Villages have been successful in obtaining Americorps dollars to fund an executive director.

As you decide on an initial fee structure, it is important to do an analysis of fee structure versus services offered as one determinant of program value.

Creating a 501(c)3

Another major step to be considered in creating a viable Village is whether the group wants to create a 501(c)3 non-profit entity. A key reason communities choose to establish a 501(c) 3 is to create a foundation for raising money for a community project, such as a Village, or charitable activity such as establishing a foundation. By obtaining a 501(c)3 status you will be in a position to seek and receive government grants as well as grants from other foundations. The non-profit status is an incentive for potential partners to contribute time and/or funds to help create and sustain your village.

Pros and cons of creating a 501(c)3 non-profit status

Pros/Benefits	Cons/Restrictions
Tax exemption- state and federal exemptions from corporate income taxes plus certain other taxes. A tax-exempt nonprofit will also save on local taxes such as levied by your state, and county.	Lots of paperwork- you will be required to establish and maintain a list of necessary documents and records
Ability To Receive Public And Private Donations- Eligible for Government and Foundation grants	Costs such as hiring a lawyer to prepare your papers
Incorporation/Protection from Personal Liability- formal structure ensures that the mission, goals, and structure of the nonprofit come before the personal interests of individuals associated with it. Board members, officers, and employees of your organization will be protected from liability for corporate debts or liabilities such as unpaid organizational debts or lawsuits against the organization. Creditors can go after only your corporate assets, not the personal assets of the people who manage, work for, or volunteer for your organization.	Costs (Time and energy to comply with regulatory demands and to grow your organization)
Eligible for lower postal rates on third-class bulk mailing	No political campaigning or lobbying
Eligibility for cheaper advertising rates	If your organization folds, its assets must be given to another nonprofit
The ability to air free radio and television public service announcements (PSAs)	Lack of privacy (finances, salaries, filings are all public)
Possibility of lower retail rates	
Individual donors to your nonprofit corporation can claim personal federal income tax deductions for their donations	

The following is a description of the process necessary to achieve 501(c)3 status. While it is possible to navigate the process without legal assistance, it is probably helpful to have legal support. If you don't have access to legal support within your community, there are pro bono legal options. Online resources for 501(c) 3 requirements and forms may be found at: <http://www.irs.gov/charities/charitable/article/0,,id=g6099,00.html>

Assuming that your village has already become incorporated, the necessary federal form to be completed and filed is the Form 1023. This further assumes that the organization is to be exempt under section 501(c)(3) of the Internal Revenue Code as a charity. (If the organization will not be performing charitable work but will be functioning simply as a community assistance group, then it may not be eligible for exemption under this section of the Code but rather under section 501(c)(4). In such an event, it should file Form 1024.) Forms 1023 and 1024, and additional information about the exemption application process, should be accessible through www.irs.gov/charities.

While it is possible to navigate the process without legal assistance, it is probably helpful to have legal support.

To obtain Maryland income tax exemption, a letter of request is required. The letter should be addressed to Comptroller of Maryland, Revenue Administration Division, 110 Carroll Street, Annapolis, MD 21411, to the attention of the Legal Department.

The letter should be accompanied by a description of the organization's nature, purpose, and scope and a copy of the organization's bylaws, financial statements, and an IRS determination letter confirming the organization's federal tax exemption as a charity. Both charities and exempt community services organizations are eligible for Maryland income tax exemption.

To obtain exemption from Maryland sales and use taxes, the organization must complete and file a Maryland Combined Registration Application available at forms.marylandtaxes.com. The Registration Application must be accompanied by the IRS determination letter, the organization's articles of incorporation and bylaws, as well as a Maryland good standing certificate. The latter can be obtained from the Maryland Department of Assessments and Taxation. Instructions to obtain a certificate are available at www.dat.state.md.us. Only charities can be found exempt.

Any organization that will be soliciting funds in Maryland must also register with the Maryland Secretary of State through the completion of a form COR-92

available at www.sos.state.md.us.

To be eligible for 501(c)3 status, your group must serve a “charitable class” - not an individual or a few individuals in a selective group. Examples of a charitable class include seniors, regardless of income and those with disability. It is important that your group document the neighbors you will be assisting and how they fall into a charitable class. You should also include with documents to IRS any newsletters, web sites, amount of people in-group, any waivers for individuals with financial hardships, include pictures.

See page 42 for additional information about 501(c)3 designation

Liability Insurance

The Village leadership should definitely consider liability insurance, particularly if you want to use high school students as volunteers. While minimum liability insurance should be sufficient, consulting with an insurance agent is advised. Villages surveyed indicated that they have \$1 million liability insurance and \$1 million directors and officers insurance. Comprehensive general insurance costs in the range of \$2,000 a year. ***See Appendix C for insurance companies specializing in nonprofit insurance.***

The Federal Volunteer Protection Act has extensive coverage for any tort claim against volunteers. In Maryland there is no tort liability for personal injury for volunteers.

Creating a Budget

Creating an operating budget is another essential part of creating an operational Village. The budget must cover the entire operation of the Village for a 12 month period. The leadership needs to decide on the beginning of the Village operational year and the end of the year. The budget needs to identify sources of income, from dues, from grants, from partnership contributions. The budget must also identify the costs to run the Village programs. For an all-volunteer organization, the following costs should be considered:

Marketing/communication costs

- Website costs
- Postage
- Newsletter printing

Meeting/social program costs

- Meeting place rentals
- Refreshments for meetings
- Speaker fees
- Misc. program costs

Supplies**Member services**

- Grocery delivery
- Ride subsidy (for use on cabs or other forms of transportation)

Other Costs

- Audit/Annual Financial Review
- Legal assistance
- Taxes
- Permits
- Liability Insurance
- Contingency

Budget considerations for a paid staff operation will include all of the above expenses plus consideration for the following:

Payroll (this will depend on the number of staff and the hours per week the staff provides)

Office equipment

Office supplies

Rent & utilities

Copying

Telephone

Repair & maintenance

See page 29 for more information about building a budget.

Organization

Your core leadership team cannot and should not do everything. Consider establishing organizational committees whether you decide on an all-volunteer organization or not. Examples of organizational committees are:

Executive Committee: This is your leadership group; they are responsible for policy, budgeting of income & expense, and committee oversight.

Finance and Budget Committee: Responsible for creating annual budget, this committee can also assume the responsibility of fundraising to obtain additional funds

necessary to operate the Village. You may desire to separate the fundraising activities from the budgeting activities that will require an additional committee.

Membership Committee: This committee is responsible for recruiting members, explaining the benefits of membership and maintaining members once they have joined the Village.

Program Committee: Responsible for creating programs of interest to members using the community survey as a guide, this committee should also seek ongoing additional input for new programs of interest to members. The Membership Committee can be responsible for creating a membership form for use at meetings, social gatherings or on the website on newsletters

Volunteer Management Committee: This committee is especially important to an all-volunteer Village. The committee organizes volunteer activity and responsibility. The committee is also responsible for volunteer training; there are volunteer resources available for training. This committee meets regularly with volunteers to address issues, celebrate successes, and make additions or reductions. The committee develops reliable processes for soliciting, vetting and implementing volunteer ideas. This committee is responsible for keeping records of volunteer activities, and obtaining feedback about how well services are being delivered. This committee is responsible for the creation of a volunteer form for a request for service, a request for volunteers to deliver service as well as the volunteer assessment and a recipient assessment of services delivered.

Fundraising or Development Committee: Necessary for both volunteer organization or with paid staff; additional funds will be required to fund your village. Identifying a group whose responsibility it is to apply for grants, approach potential community partners, and donations from Village members.

Nominating Committee: A committee to identify new and existing leaders willing to serve in a leadership capacity.

Meeting Etiquette

To improve the effectiveness of your committee meetings, be sure to follow these tips:

- Follow Robert's Rules of order. For more information about Roberts Rules online, visit: www.robertsrules.org
- Under no circumstances should "undue strictness" be allowed to intimidate members or limit full participation.
- Prepare and post an agenda
- Clearly state the purpose of the meeting on the agenda
- Start and end on time
- Keep the meeting moving and watch the general flow
- Encourage participation
- Summarize the conversation frequently
- Stress cooperation, not conflict
- Summarize decisions reached
- Point out differences not yet resolved

4 Building A Village Budget

Your Village budget is the operating blueprint that outlines your Village's priorities. The budget functions as a road map for the next year and perhaps longer. The size of your budget, the income and expenses the Village incurs depends on several critical decisions that are made about the operation of your Village.

The first decision to affect the budget is whether or not your Village hires staff to support the Village activities or whether your Village becomes an all-volunteer managed organization. Paid staff adds a substantial amount to the Village's expenses; you should plan on a salary between \$45,000 - \$80,000, depending on experience of the individual and the hours they commit to the job.

The budget is
your road map
for the next
year and
perhaps
longer.

Another major effect on the expense side of the budget is the scope of the programming the Village decides to offer. Will the Village offer programs at no cost to Village members or will the programming be presented as a "pay as you go" operation?

Budgeting decisions will depend on the projected income the Village thinks it will receive. Identify where the money will come from. Will your Village go after grants and donations to subsidize the costs of running the Village? Consideration should be given to appointing a development or fundraising committee to identify and solicit funds to subsidize dues. Identify members living in your Village who can afford and are willing to offer donations to help start and fund your Village.

Look for ways to reduce costs, including space donations or donations for refreshments from local grocery. Often businesses located in the area of your Village are willing to donate in services or coupons for services rather than cash. Consider establishing an advisory committee of strategic partners who may not be Village

members but who can and are willing to assist your Village with “in-kind” or actual monetary donations.

Membership Fees

The decision on the amount to charge for membership fees depends whether you have an all volunteer model or use paid staff. A membership fee, should you decide to have one, is based on the size and complexity of your Village program. The ability of

Look for foundation support to provide support to those that can’t afford membership.

your target audience to pay the membership fee is also a consideration. A sample of membership fees from around the country include no membership fee all, a small fee of \$15-30/year to a high of \$1,000/year per household.

See Appendix C for examples of village fees.

Membership fees in the Montgomery County

Burning Tree Village: No membership fee

Bannockburn Neighbors Assisting Neighbors: No membership fee

Examples of membership fees in other parts of the country

Capital Hill Village	DC	\$530/yr/individual
Northwest Neighbors Village	DC	\$500/yr/indiv, \$750/household
DuPont Circle	DC	\$450/yr/indiv, \$600/household
Palisades Village	DC	\$500/yr/indiv/\$750/household
Home Ports Inc.	MD	\$300/yr/household

The following are budget categories you should consider when building your budget.

Income Assumptions

- Number of Current Members (dues)
- % of single members
- % of couple members
- % of free members
- Number of new members projected (dues)

Operating Revenues

- Membership dues/renewals
- New member dues
- Program income
- Interest/Dividend Income
- Total Operating Revenue

Operating Expense

- Payroll (if you have a paid staff)
- Management fee (if you do not have volunteer management)
- Membership services
- Program Expense
- Total Operating Expense

Marketing Expense

- Marketing materials
- Web Site/AOL
- Member solicitation
- Special Events
- Newsletter
- Ads/PR
- Total Marketing Expense

Office Expense

- Office supplies
- Copying
- Telephone
- Rent & Utilities (if you have paid staff)
- Office equipment
- Postage
- Repair & maintenance
- Total Office Expense

Event Expense

- Room rental
- Refreshments
- Speaker fees
- Fundraising
- Professional services
- Board & Staff development

Other Expense

- Audit/Review
- Taxes & Permits
- Insurance
- Board gift fund
- Total Other Expenses

Operating Income (loss)**Contingency****Non-Operating Activity**

- Foundations
- Board
- Large Donors
- Annual fund
- Existing Pledges
- Total Non-Operating Activity

Net Income (Loss)

Sample Financial Statement

Financial Statement

Balance Sheet		
Current Assets	Total Checking/Savings	3,810.00
	Total Current Assets	3,810.00
TOTAL ASSETS		3,810.00
LIABILITIES & EQUITY		
	Equity	
	Net Income	3,810.00
	Total Equity	3,810.00
TOTAL LIABILITIES & EQUITY		3,810.00
Profit and Loss		
Ordinary Income/Expense		
	Income	
	Nonprofit Organization Grants	650.00
	Gifts in Kind - Goods & Service	540.00
	Individual, Business Contributions	4,900.00
	Total Income	6,090.00
	Expense	
	<u>Operations</u>	
	Business Registration Fees	515.00
	Accounting Fees	0.00
	Logo Design	300.00
	Cost of in Kind Copying	540.00
	Computer	0.00
	Parking	4.00
	Postage, Mailing Service	95.00
	Printing and Copying	5.00
	Supplies	415.00
	Telephone, Telecommunications	0.00
	Website Registration	36.00
	<u>Total Operations</u>	1,910.00
	<u>Program Expense</u>	
	Kickoff	370.00
	Seminar & Training	0.00
	Social	0.00
	<u>Total Program Expense</u>	370.00
	Total Expense	2,280.00
Net Income		3,810.00

5 Getting the Message Out

Communication & Marketing

Once you have completed the initial organizational phase and have an established leadership group with assigned responsibilities, your next big step is communicating your plans and ideas with your identified target audience, your potential Village members. You have probably spent close to a year getting organized and are motivated and excited about the boundless opportunities for your new Village. Your next big and important job is to sell your enthusiasm, vision, and excitement to members of your community and potential Village members.

Nothing will
create interest
and sell the
benefit of
membership in
your Village like
personal
contact.

Remember, nothing will create interest and sell the benefit of membership in your Village like personal contact. Telephone trees are effective in getting the message out as well as small block by block teas or coffees to introduce neighbors to the Village idea and the benefits of joining. Some communities have established block captains to personalize messages about the Village to the community.

The Survey – The Earliest Communication

The first big marketing program should be started prior to the dissemination of the community survey. Preparing the community for the survey and emphasizing the importance of each resident's response should be an early goal. Using your community newsletter, promoting the upcoming survey at community meetings, and word of mouth are effective means of alerting your community to the survey arrival and the significance of each resident's response. Even in the earliest communications, you

must promote the benefits of a Village organization and the benefits of a Village to the members of your community.

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Community Outreach

Simultaneous with and continuing beyond the survey marketing and promotion, the leadership and committees responsible for marketing and PR need to reach out and deliver your message to local community organizations such as:

- Chambers of Commerce
- Religious Congregations
- Local Hospitals, Clinics and Health Care Professionals
- Local Libraries
- Local Colleges and/or Junior Colleges
- Community Newspapers and Magazines
- County Regional Services Centers

One or a combination of many of these organizations can help deliver your message to shared constituencies. In addition to helping you deliver your message, many of these organizations are potential partners that can help you with grants, pro bono work such as legal, leadership training, book keeping and accounting, and program planning.

Maintaining an ongoing relationship with these community organizations will provide support as well as real or implied endorsement for the creation of your Village.

Marketing Plan

Selling any idea or product requires a thoughtful marketing plan. Ongoing communication with repeated yet updated messages help sell your program.

As you develop your marketing plan consider:

- Regular articles in your local community newsletters
- Start your own Village newsletter to deliver a targeted message
- Articles in professionally published newspapers
- Articles in local church and synagogue newsletters
- Door to door messages
- Informational brochures
- Neighborhood meetings
- A website with contact information

Try to identify a resident with computer technology skills to help create a website for your Village. Other sources of help to create your website are

- Montgomery County Volunteer Center: offers pro bono assistance, volunteer training, and services in a variety of languages.
- Montgomery College
- Local High Schools

Implementation

A neighborhood newsletter is an effective way of delivering your Village message and staying connected to community

Many seniors, regardless of age, don't regard themselves as "old" or in need of assistance.

residents. A regular newsletter creates Village visibility and identity and is a vehicle for getting the word out about Village activities. A cost effective method of delivering the newsletter to residents is to use Village volunteers

An aggressive implementation of your marketing plan will enhance acceptance of your proposed Village. A combination of education and selling will provide community residents with an understanding of the Village concept and the benefits of the program for them. Don't underestimate the value of continuing to emphasize the benefits a Village organization has for community residents.

A word of caution about your marketing efforts - many seniors, regardless of age, don't regard themselves as "old" or in need of assistance. Independence is very important for older adults. When selling the benefits of creating a Village, think about selling a third stage of life that is exciting and trouble-free. Your communications should emphasize messages of fun, convenience, and peace of mind, not dependency.

Preparing for and Holding Your First Community Meeting

After the survey has been evaluated, then another marketing campaign needs to be mounted to promote the initial community meeting to launch the Village. This meeting is your opportunity to sell the vision and proposal to the community as well as obtain suggestions from community members. Three to four weeks of notification through various communications channels is needed to alert community members about the meeting including but not limited to house to house leafleting to promote the benefits of a Village program. All leadership members should be tasked with promoting attendance at the community meeting.

The meeting should be rehearsed and well orchestrated. A history of the early committee work, resources found, research and discovery of other Village operations should be presented by chart and by as much graphic material as possible. You might want to consider having speakers from other Montgomery County Villages, County

Health and Human Services, or from a Regional Services Center to reinforce your presentation.

Remember as you prepare for your first meeting, you only get one chance to create a good impression – BE PREPARED. Be prepared with a comprehensive presentation that:

- Introduces the leadership team, emphasizing their credentials and contributions
- Outlines the work that the leadership group has done prior to the meeting including: (it is helpful to have some of this information as handouts and as power point presentations)
 - Contacts made
 - Information learned from various sources
 - Mission statement & goals
 - Neighborhood boundaries
 - Village name
- Detail the results of the community survey and the proposed programs as a result of the survey results. The survey results should be a handout to attendees and be part of a power point presentation
- Discussion of leadership proposal for an all volunteer program or a paid staff program with pros and cons for each decision.
- Discussion of next steps. This is an opportunity to draw in more community participation as the organization process moves to another step.
- Open forum: Be prepared to answer tough questions. There may be responses that question the leadership group's decisions. It is important that such questions are addressed professionally. Questions cannot be taken personally by the leadership group. All input should be taken seriously and decisions may have to be re-thought as a result of community input.

Communications and Marketing are Ongoing

Marketing is a tool to both educate and encourage potential users about services available to them and for users to take advantage of the services offered. It is important to keep the Village message before the community. Ongoing articles, community meetings, reaching out to community partners, and word of mouth marketing help with your ultimate goal of getting buy in from community members. Your leadership group will need to constantly market the message to potential members in order to keep your membership growing. Remember, marketing includes listening as well as telling and sometimes listening is more valuable.

6 Managing Your Village

To be an all-volunteer organization or to pay for staff; that is the decision! (See more in Chapter 3) The Village leadership has made this decision early on. Should the Village operate as an all-volunteer program or should the Village hire paid staff to manage the operations of the Village program. The decision of whether to have a volunteer program or use paid staff is a major decision and will affect the way in which your Village operates. Villages across the country and in this area are operating using both formats. Either format can be successful in serving the needs of the Village members. Which format is best for your Village?

See page 18 for pros and cons of paid staff management and all-volunteer Villages.

Effective management systems are required in order for your Village program to run smoothly, for you to stay on track, achieve your goals and measure your success.

Management Committee

An approach that has proven successful in many Villages is the establishment of a Management Committee. The duties of the Management Committee include monitoring the operations of the Village, creating management forms, monitoring the forms, as well as creating the budgets and monitoring the cash flow. The committee can also monitor the operations of the organization, making recommendations for change as needed. This committee, along with the Executive Committee can also be responsible for monitoring the rules and regulations of the organization as well as the Village bylaws. This committee should meet regularly, once a month should be adequate unless a special need arise.

Standard Forms

Developing standard forms for ongoing activities should be addressed before you launch your Village program. The following are samples of the forms you should develop.

Job Descriptions: The importance of clear, well written job descriptions is addressed in Chapter 8, The Care & Feeding of Volunteers. Volunteer job descriptions are important for both an all-volunteer Village or a Village using paid staff. Setting expectations helps everyone do their job better and makes for a more effective program.

Membership Forms: Capturing all the necessary information from your members and potential members is helpful in a variety of areas. Membership forms should capture all the pertinent contact information. This information may be later used in a membership directory or simply for communication purposes by the Village leadership and volunteer program managers. One of the lifelines of your Village is an accurate database of Village members. Membership forms should also supply the leadership with feedback about resident's needs and interests. The needs and interests of Village members create the basis for your Village programming in order that it is relevant and responsive. This may change over time so it is necessary to continually update this part of the form to keep your information current.

Volunteer Forms: Volunteer forms detail the volunteer positions available. The form provides the leadership with a database of interested and qualified volunteers and their contact information. The volunteer forms should provide space to allow the volunteer to indicate the amount of time they are willing to give to the project for which they are volunteering. The volunteer form should also provide an indication of the minimum amount of time required for each job. Allow volunteers to prioritize their volunteer preferences. Don't forget space to capture the volunteer's contact data.

Feedback, Quality Assessment and Record Keeping Forms: Again, these are important exercises whether you are an all volunteer Village or have paid staff. Feedback, quality assessment and record keeping are all part of controlling and improving the services offered members. It is a means of measuring success as well as recording areas of improvement.

Feedback: Feedback from your volunteers as well as from those receiving services is important in helping leaders and staff assess the quality of service provided. Feedback helps re-enforce those things that are going well and supports maintaining successful activities. Feedback also provides information to help increase the effectiveness of the services being offered. Developing a standardized feedback format with appropriate documentation helps the Village leadership assess the effectiveness of their programming, their volunteers and their management systems. Create a form that elicits routine and standardized information from those that deliver services and those that receive services.

Record Keeping: Record keeping is an important tool to assess the success or failure of a particular program. Keep records of how many people in your Village attend a particular program, the amount of money spent on the program, any outside contractors required to help produce the program including contact information and how many volunteers helped and in what capacity. Records must be kept in a designated place in an organized manner in order for them to be accessible for others to use and for evaluation purposes.

Organizational Bylaws

An important part of creating your Village is creating organizational bylaws that will govern your Village's operation. The Bylaws are your organizational structure and provide guidance on the operation of your Village. See Chapter 8, Sample Director for sample By-Laws that you can use or modify for your Village.

Tax Exempt Status

A Village organization should consider tax-exempt status filing for 501(c) 4 status with the IRS. To be eligible, a civic organization or Village must be operated exclusively for the promotion of social welfare and not organized for profit.

See page 23 for additional information on creating a 501(c)3).

Unlike 501(c) 3 status, a 501(c) 4 organization may be politically active. Also, contributions to a 501(c) 4 are not deductible. The following are excellent online resources for learning more about 501(c) 4 status:

- <http://www.irs.gov/charities/nonprofits/article/0,,id=96178,00.html>
- <http://nonprofitmanagement.suite101.com/article.cfm/what> is a 501c4 organization

Local bar associations may be able to direct your Village leadership through “pro bono” or reduced-cost legal services from lawyers experienced in the non-profit sector. In Montgomery County, contact the Maryland Bar Foundation Pro Bono Program at 301-424-7651, if you are looking for assistance. Their address is: 27 West Jefferson Street, Rockville, MD 20850.

Ethics and Confidentiality

Working as a volunteer often provides personal and sensitive insights into the lives of those receiving volunteer services. Volunteers must be aware of the necessity of not talking about a recipients’ health, financial condition or other personal matters that volunteers may learn as a result of offering service to a Village Resident. Creating a “Code of Ethics” for volunteers to sign and follow is an important document to develop and use. You may receive pro bono help from Montgomery County Bar Association or from the Montgomery County Volunteer Center.

See Appendix B for sample ethics form and guidelines

Strategic Planning: Another Phase of Management

Once you have started your Village, accomplished the initial steps of planning and implementing your Village program, a next and important step is for your leadership team to enter into a strategic planning exercise. Strategic planning is a process where the members on your team obtain consensus on the direction of your organization, in this case Village, will take for a time period of 1 – 3 years. A strategic plan gets your leadership team on the same page focusing on the direction of your village for a given period of time. It also has a purpose of building trust amongst your leadership. It is best that the strategic plan exercise be led by someone outside your Village organization, someone who is objective and has no vested interest in the outcome of the plan.

A Strategic Plan
Must have
a mission, goals, and
objectives.
Most have vision and
values
May also have
background/ stories,
results/targets,
implementation, roles,
timeline, a budget
forecast, and evaluation

Planning Process

- Data Gathering & Analysis
 - Current State
 - Strengths, Weaknesses, Opportunities & Threats (SWOT)
- Strategic Plan: 1 – 3 years
 - Future State
 - Mission, Vision, Values
- Implementation of Plan
 - Budget
 - Job Descriptions
 - Evaluation

Tracking Your Strategic Plan and Setting Benchmarks

It is important to build into your strategic planning process regular and routine tracking and evaluation of the goals set out in the strategic plan. Ongoing evaluation will help you get back on track toward achieving your goals. It is important to measure your successes and your challenges in order to evaluate the next steps you need to take to meet the needs of the members of your Village. Planning is a wasted exercise without tracking and evaluating how your actual program measures up to the goals you established for the organization during your strategic planning process.

7 The Care and Feeding of Volunteers

The success of your Village will depend on the success of your volunteer program – and the success of your volunteer program depends on up-front training and expectation setting for Village volunteers. Whether you choose to hire paid staff or operate an all volunteer program, the effectiveness of your volunteer program has a direct relationship on your ability to meet the goals and needs established by your Village. Villages are based on the premise of neighbors helping neighbors.

The results of your community assessment will identify the services members of your Village are interested in receiving. Identifying the services will lead to an understanding of the type and scope of volunteer services required to meet community needs. For each volunteer service required, a job description should be written that describes the job to be done and the volunteer expectations for delivering that service. Setting expectations for your volunteers and understanding their motivations will go a long way to creating a positive experience for volunteers.

A job
description
should be
written for
each volunteer
service
required.

Hiring Volunteers

Selecting individuals for volunteer jobs is no less important than selecting employees in a business. In both instances you will have the best success if you match job description and expectation with the individual's skills and motivations. Just as staffing for a job requires an interview, staffing for volunteer positions also requires an interview. You want to find a match between the potential volunteer's motivation and the volunteer job description and expectation. If you don't find a match, perhaps you can coach that potential volunteer into another volunteer position that more closely matches the volunteer's motivation and skills.

The goal of the volunteer interview is to determine:

- Volunteer experiences and skills
- Volunteer's motivation for seeking the volunteer job
- Sharing of the job description of the volunteer job
- Clearly outlining the expectation for the volunteer job
- Clearly define the time commitment required for the volunteer job

Creating an effective volunteer program requires creating an effective volunteer management system. Ultimately, someone needs to be identified as the person in charge, the person that makes the final decision regarding the volunteer program and its goals and objectives. In short where does the buck stop?

Volunteer Management and Training

You may create a volunteer management system that has several layers. For example, you may want to organize your Village by blocks with block captains to recruit members, disseminate information, to report needs of residents on their block, to bring services to residents as they need. You may want to create a management system that organizes volunteers by project. However you decide to organize your volunteer program and however many levels of volunteer managers you decide are best for your Village, remember, to be effective, one person ultimately has to be in charge, you need to decide where the buck stops and make sure all your volunteers are clear who that person is.

To be effective,
one person
ultimately has
to be in charge.

Volunteer Job Suggestions

Here are samples of jobs that your Village might want to consider for their volunteer program.

- Transportation
- Handyman, fix it
- Shut in visits
- Pet Care
- Errands
- Financial assistance (check writing, checkbook balancing)
- Technical help
- Social networking
- Program director
- Communications and Marketing
- Respite Visits
- Meals

Volunteer Training

Effectively hiring and employing your volunteers requires skill and practice. As you work through creating your Village you may want to pursue volunteer training seminars to give you pointers about handling training effectively. Here is a list of resources that can work with your leadership team to organize training sessions for your volunteer managers and may also be sources for liability insurance coverage*.

- **Regional Services Centers**
- **Montgomery County Volunteer Center** - Phone 240-777-2600, email volunteer@montgomerycountymd.gov
- **Iona Senior Services** - Phone 202-966-1055, website www.iona.org
- **Bethesda Help*** - Phone 301-365-2022, email info@bethesdahelp.org
- **Montgomery County Fire & Rescue as well as local hospitals** offer CPR training and other first aid training that volunteers might need dealing with a senior population.

Key Points for the Early Stages of Volunteer Management

Start Small: Focus on two volunteer tasks as a launching point and recruit specifically for those tasks.

Complete two job descriptions so that perspective volunteers will know exactly what they are expected to do. Anticipate roughly 8 – 12 volunteers screened and trained during this first cycle.

Continually Assess Needs: Don't rely on people who said they might need services six months ago. Keep lists of potential clients updated. Until you recruit and train volunteers to meet a specific need, you cannot guarantee helping someone.

You Are a Broker: This means that you have to make sure that any volunteer you refer to a client must be trustworthy, have a clean driving record, and should be carefully trained. These volunteers will be representatives of your Village, and since word of mouth will be an important part of maintaining a viable Village, you may want to do all you can to deliver services effectively.

Don't Forget the "Harry Truman" Rule; Identify where the buck stops! In all aspects of recruiting, screening, and training volunteers, there must be one or two people who are ultimately responsible for coordinating these efforts. Once your program becomes operational, it will be even more critical that both clients and volunteers know the chain of command for any issues they might have.

Volunteer Commitment & Sustainability

Inherent in a volunteer organization is sustaining commitment. One of the biggest challenges in your Village organization is to keep your volunteers committed to their jobs. Volunteer training, setting job expectations, understand the motivation of our volunteers are all important parts of keeping your group of volunteers motivated and involved.

Something to keep in mind as you develop your volunteer program, research has shown that today's volunteers respond better to short-term projects rather than long-term commitments. On the other hand, you will find some in your community that like the idea of a long term commitment, they are able to plug in the time with

predictability and like to know, for instance, that every Wednesday from 9am – noon they will be volunteering to drive neighbors to their doctor's appointments. With these different preferences in mind, you can plan your volunteer jobs for both short-term phases and long term, ongoing projects. Constant and ongoing communication from the volunteer managers to the volunteers goes a long way to keeping volunteers happy and involved.

Legal and Liability Issues

Villages should consult with their own legal advisor on liability issues. Questions about liability issues have arisen regarding volunteer protection should anything happen to the recipient of the volunteer services during the time that the volunteer is delivering those services. For instance, if a volunteer is driving a Village member to a doctor's appointment and gets into an accident, will the volunteer be protected or is specialized insurance necessary? One of the benefits of Burning Tree Village's partnership with Senior Connection is that Senior Connection provides liability insurance for that Village's volunteers.

There appears to be some liability coverage for volunteers under the Maryland Good Samaritan Act (see summary below). Maryland law 5-309, 5-406, and 5-407 covers personal liability for charitable organizations utilizing volunteers for such purposes as driving to doctor's appointments, driving to grocery stores or home visits.

Confidentiality

Helping your volunteers understand the need for privacy and confidentiality should be a key part of volunteer training. Your volunteers may enter a home and discover a resident who is not eating or a resident who is a "hoarder." Situations such as these should be reported to a trained social worker, the volunteer should not take it upon themselves to solve problems of depression, health or other psychological issues. A volunteer may call the Montgomery County Mental Health Hotline for 24-hour assistance for a resident in distress, 301-738-2255.

See Appendix B for red flags and mental health resources.

In addition, the volunteer must also clearly understand that what they see and experience with a resident is private information and must not be discussed with neighbors, friends, or family. It is a good idea to create a confidentiality form for each volunteer to sign. The form will re-enforce the importance of confidentiality.

Summary

A volunteer is defined as a director, officer, trustee, or other person who provides services or performs duties for a charitable organization without receiving compensation.

Volunteers are not personally liable for damages in any suit if:

- The organization maintains insurance covering liability incurred by the organization or its agents or both as a result of acts or omissions of its agents in providing services or performing duties on behalf of the organization
- The insurance policy covers acts or omissions, which are the subject matter of the dispute, and there is not a reason for denial of the coverage by the insurance carrier. See the statute for exact coverage amounts

Volunteers are not liable for damages beyond the limits of any personal insurance that the volunteer may have in a suit arising out of any act or omission committed in connection with the services provided to the organization, unless:

- The volunteer knew or should have known of an act or omission on the part of another volunteer or the volunteer authorizes, approves or actively participates in the act or omission.

- After the act or omission the volunteer with full knowledge of the act or omission ratifies it.
- The act or omission constitutes gross negligence, reckless, willful, or wanton misconduct or intentionally tortuous conduct.
- It was found that they acted with malice or gross negligence to the extent that the damages exceed the limits on the organization's insurance policy.

Most insurance companies cover passenger liability as part of their policy regarding liability. If a volunteer is concerned about exposure, they should contact their insurance agent/company directly and explain that they are volunteering and want to know if they are covered in the event of an accident.

Volunteers are a mainstay of our Village organization. The whole premise of the Village concept is neighbors helping neighbors. Establishing a strong volunteer program early on, clearly defining expectations and carefully managing your volunteer resources is a good formula for your Village program success.

Volunteer Management Software

(many of these have online demos and free trials)

- [Blackbaud](http://www.blackbaud.com/) makes a variety of products that include volunteer management components (although the company rarely uses the word "volunteer" in describing their products) - <http://www.blackbaud.com/>
- [CERVIS](http://www.cervistech.com/) (Community Event Registration and Volunteer Management System) - <http://www.cervistech.com/>
- [CiviCore Volunteer Management](http://www.civicore.com/index.cfm?fuseaction=solutions.display&content=Volunteermanagement) - <http://www.civicore.com/index.cfm?fuseaction=solutions.display&content=Volunteermanagement>
- [CiviCRM](http://www.civicrm.org/), open source and freely downloadable - <http://www.civicrm.org/>
- [OrgAction Online Volunteer Database](http://www.orgaction.com/) - <http://www.orgaction.com/>
- [ROVIR, the Retriever of Volunteer Information and Reporting](http://www.rovirinfo.com/) - <http://www.rovirinfo.com/>
- [Samaritan Technologies](http://www.samaritan.com/) (eCoordinator) - <http://www.samaritan.com/>

- [Son of Service \(SOS\)](http://sos.sourceforge.net/) (free) - <http://sos.sourceforge.net/>
- [Tools for Organizations](http://www.toolsfororganizations.com/habitat/scheduling.php)/Habitat Scheduling - <http://www.toolsfororganizations.com/habitat/scheduling.php>
- [TechSoup.org](http://www.techsoup.org)(IT organization with great resources for discounted software and some hardware) – [www.TechSoup.org](http://www.techsoup.org)
- [V2/Volunteer2/Volunteer Squared/Volunteer Impact](http://www.volunteer2.com/) - <http://www.volunteer2.com/>
- [Volgistics](http://www.volgistics.com/), Red Ridge Software - <http://www.volgistics.com/>
- [Volunteer Event Management \(VEM\)](http://www.volunteersolutions.org/products/vems/) from Volunteer Solutions - <http://www.volunteersolutions.org/products/vems/>
- [Volunteer Spot](http://www.volunteerspot.com/) - <http://www.volunteerspot.com/>
- [Volunteer Reporter](http://www.volsoft.com/) (formerly RSVP Reporter) - <http://www.volsoft.com/>
- [VSys One](http://www.vsysone.com/) - <http://www.vsysone.com/>
- [When to Help](http://whentohelp.com/) - <http://whentohelp.com/>

See Appendix B for more volunteer management resources.

About the Author

Leslie Marks is a native Washingtonian who moved to Montgomery County in 1948. She is a graduate of Bethesda-Chevy Chase Senior High School. She has deep roots in Montgomery County; all three of her children and her two grandchildren live in Montgomery County.

Leslie has spent over 30 years in the building industry, 20 years of which have been dedicated to the senior housing segment of the industry. Ms. Marks was the project manager for the development of Maplewood Park Place, a retirement community in Bethesda, Maryland. She ran the National Association of Home Builders seniors housing program for eight years. She currently consults with builders and developers who want to build age restricted senior housing.

Her volunteer activities include the vice chairmanship of the Montgomery County Vital Living Committee and a member of the Montgomery County Commission on Aging.

About the Bethesda-Chevy Chase Regional Services Center

Montgomery County's Regional Services Centers were charged by the County Council in 1975 with a mission to lead interagency efforts to strengthen communication between the community and various agencies of County Government; coordinate necessary interagency action with respect to the local area; and recommend programs and policies tailored to the local community.

The Bethesda-Chevy Chase Regional Services Area includes neighborhoods in the Bethesda-Chevy Chase, North Bethesda/Garrett Park, Potomac, and Rockville planning areas.

The Bethesda-Chevy Chase Regional Services Center first opened in Bethesda in 1979. The Center was originally housed in the reference room at the Bethesda Regional Library on Arlington Road. In the early 1980's both the Library and the Center needed additional space and the Center moved to Woodmont Avenue. In December, 1996 the Center moved to a brand new County building located in the heart of downtown Bethesda, near the Bethesda Metro Center and above the County's Bethesda Center parking garage.

The Center is located at 4805 Edgemoor Lane, Bethesda, MD 20814. The Center is open on weekdays from 8:30 a.m. to 5:00 p.m. The phone numbers are 240-777-8200 (voice), 240-777-8212 (TDD) and 240-777-8211 (FAX). The Center's e-mail address is *bethesda.citizen@montgomerycountymd.gov*.